

Open A BK Case

NOTE: Several bankruptcy software providers have developed products that greatly simplify the filing of new bankruptcy cases using Case Upload. You are strongly encouraged to contact your petition software provider.

NOTE: Form B21 is not required for electronically filed petitions.

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Open a BK Case**.

STEP 3. At **Open New Bankruptcy Case** screen:

- ☐ **Case type** – will stay **BK**;
- ☐ **Date filed** – set to default to date of case entry;
- ☐ **Chapter** – click on down arrow and select appropriate Chapter;
- ☐ **Joint Petition** – if only one debtor, leave on “n”; if debtor and joint debtor, change to “y”; and
- ☐ **Deficiencies** – ignore this field, leave default.
- ☐ Click **Next**.

STEP 4. At **Search for a party** screen:

- ☐ Search for any previous filings by the debtor by either entering the debtor’s Social Security Number (XXX-XX-XXXX), Tax ID Number or debtor’s last/business name.
- ☐ Click **Search**.

STEP 5. A drop-down box will display if the search criteria matched a previous bankruptcy filing.

- ☐ If the debtor is listed, click on the debtor’s name.
- ☐ Confirm the information in the pop-up matches 100% (first, middle, last name; address; county).

- ☐ If it does, click **Select Name From List**.
- ☐ If there is no match OR the retrieved information doesn't match exactly, click **Create New Party**.

STEP 6. At **Party Information** screen:

- ☐ Enter debtor's last, first and middle name as they appear on the petition.
- ☐ Add any generation (Jr., III) or title (Dr., Prof.) as they appear on the petition.
- ☐ Enter debtor's Social Security Number and confirm entry is correct.
- ☐ Add Tax ID number if necessary.
- ☐ Enter the debtor's mailing address as it appears on the petition, following the procedures set forth in the Style Guide.
- ☐ Enter debtor's county of residence.
- ☐ Do NOT fill in Country.
- ☐ Do NOT fill in Phone.
- ☐ Do NOT fill in Fax.
- ☐ Do NOT fill in E-mail.
- ☐ ProSe defaults to no.
- ☐ Role defaults to Debtor.
- ☐ If entering a Joint Debtor, click in the Role box. A drop down box displays. Type "j". This automatically selects Joint Debtor. Tab to next field.
- ☐ Party text should be left blank.
- ☐ Click **Alias** if debtor has aliases or dbas. Enter as they appear on the Petition. Any business names need to be entered in the **Last name** field. Any additional Social Security Numbers or Tax ID numbers need to be entered in the **Last name** field. Enter as they appear on the petition. Leave **Role** as aka.

If there are more than five aliases and/or additional Social Security or Tax ID Numbers, after entering the first five click **Add aliases** to return to the **Party**

Information screen. Then click **Aliases** to return to the **Alias Information** screen with additional spaces for entry. Continue until all aliases and/or Social Security or Tax ID Numbers are entered.

Click **Add aliases**.

- ☐ Confirm all information is correct.
- ☐ Click **Submit**.

STEP 7. The **Divisional Office** screen displays.

- ☐ This indicates whether the new bankruptcy will be administered from the Eugene or Portland office of the Bankruptcy Court.
- ☐ Click **Next**.

STEP 8. If the petition is for joint debtors, another **Search for a party** screen will display.

- ☐ If there is a joint debtor, return to **STEP 4** and proceed through for the joint debtor.
- ☐ When entering the search criteria for the joint debtor, a question will display: Copy previous party's address. If the address for debtor and joint debtor is the same, leave the box checked. If the joint debtor's address is different from the debtor's, Click in the box to remove the check.
- ☐ If no joint debtor, continue to **STEP 9**.

STEP 9. Petition information screen displays.

- ☐ In the **Type of debtor** section, click on all boxes that apply to the debtor, as on the petition.
- ☐ If a box is marked that should not be, de-select by clicking on the box marked with a ✓.
- ☐ Answer the remaining items by clicking on the down arrows and selecting a new item or leave the default. Answer all items as they appear on the petition.

NOTE: If paying by installments, change **Fee status** from **Paid** to **Installment**. Don't forget to file LBF #110 (Individual Debtor's Application to Pay Filing Fees in Installments) as a separate item. The event is: Bankruptcy - Motions/Applications - Pay Filing Fee in Installments.

- ☐ Do not answer **Date split/transfer**. Leave blank.
- ☐ If filing a Chapter 11, 12 or 13 petition, change **Asset notice** to “y”.
- ☐ Click **Next**.

STEP 10. Click **Next** again to confirm filing of the petition.

STEP 11. The PDF attachment screen displays.

- ☐ If filing by installment payments, indicate the amount of payment in the **Fee** field.
- ☐ If paying in full, the proper filing fee appears.
- ☐ Click **Browse** to select the appropriate PDF to attach the Petition.
- ☐ Click **Next**.

STEP 12. Click **Next** again to confirm filing of the petition.

STEP 13. The **Docket Text: Final Text** screen displays.

- ☐ Confirm the docket text is correct.
- ☐ Click **Next**.

STEP 14. The **Electronic Payment** window displays.

- ☐ Click **Pay Now** to pay all fees due to the court.
- ☐ Click **Continue Filing** to file another case or document.

STEP 15. The **Notice of Bankruptcy Case Filing** screen displays.

- ☐ Note Bankruptcy Case Number.

STEP 16. Upload the creditors. See separate procedure.

STEP 17. File other documents associated with the Petition.

- ☐ **Chapter 7 Petitions:**

1. If paying by installments, file LBF #110 (Individual Debtor's Application to Pay Filing Fees in Installments). The event is: Bankruptcy - Motions/Applications - Pay Filing Fee in Installments.
2. If the debtor is a non-government corporation, file the Corporate Ownership Statement. The event is: Bankruptcy - Miscellaneous - Corporate Ownership Statement.

☐ **Chapter 11 Petitions:**

1. The List of 20 Largest Unsecured Creditors is filed **as part** of the Petition, at the very end. Include a Certificate of Service indicating that a copy of the List of 20 Largest Unsecured Creditors and the necessary pre-addressed, stamped envelopes were delivered to the Office of the U.S. Trustee.
2. If the debtor is a non-government corporation, file the Corporate Ownership Statement. The event is: Bankruptcy - Miscellaneous - Corporate Ownership Statement.
3. If paying by installments, file LBF #110 (Individual Debtor's Application to Pay Filing Fees in Installments). The event is: Bankruptcy - Motions/Applications - Pay Filing Fee in Installments.

☐ **Chapter 12 Petitions:**

1. File LBF #1340 (Certification Re: Tax Returns/Proof of Income). The event is: Bankruptcy - Miscellaneous - Certification Re: Tax Returns.
2. File LBF #1200 (Chapter 12 Plan). The event is: Bankruptcy - Plan - Chapter 12 Plan.
3. If the debtor is a non-government corporation, file the Corporate Ownership Statement. The event is: Bankruptcy - Miscellaneous - Corporate Ownership Statement.
4. If paying by installments, file LBF #110 (Individual Debtor's Application to Pay Filing Fees in Installments). The event is: Bankruptcy - Motions/Applications - Pay Filing Fee in Installments.

☐ **Chapter 13 Petitions:**

1. File LBF #1340 (Certification Re: Tax Returns/Proof of Income). The event is: Bankruptcy - Miscellaneous - Certification Re: Tax Returns.
2. File LBF #1305 (Attorney's Disclosure of Compensation). The event is: Bankruptcy - Miscellaneous - Attorney Disclosure of Compensation.
3. File LBF #1300 (Chapter 13 Plan). The event is: Bankruptcy - Plan - Chapter 13 Plan.
4. If paying by installments, file LBF #110 (Individual Debtor's Application to Pay Filing Fees in Installments). The event is: Bankruptcy - Motions/ Applications - Pay Filing Fee in Installments.

STEP 18. Assign the Judge/Trustee.

NOTE: This step must only be done AFTER all related case opening documents, that are going to be filed at the time of opening, have been filed (e.g., LBF #1340 (Certification Re: Tax Returns/Proof of Income); LBF #1305 (Attorney's Disclosure of Compensation); etc.).

- ☐ This may be done after the entry of multiple cases. This will help keep the 341(a) Meeting of Creditors together.
- ☐ Click on **Bankruptcy** on the ECF Main Menu Bar.
- ☐ Click on **Judge/Trustee Assignment**.
- ☐ The 341(a) Meeting of Creditors will be set and the Judge and Trustee will be assigned.

NOTE: The system will only assign a Trustee and 341(a) Meeting of Creditors date for Chapters 7 and 13. The Court will send notice for Chapters 11 and 12 341(a) Meeting of Creditors and trustee assignment.

NOTE: If filing a minimum petition, remember to file the deficient documents, except those items listed above, under "Missing Documents Filed". See separate procedure.